

CHARTER

STUDENT AID AWARENESS IPT

TEAM NAME -

STUDENT AID AWARENESS IPT

SHARED AND MEANINGFUL PURPOSE -

PURPOSE-

To help put America through postsecondary school to insure all students can achieve their dreams. Applicants will get the right information at the right time to help them make informed decisions on financial aid options.

WHY NOW?-

Currently, we are not reaching as many and divergent a set of people to provide the opportunity to know about financial aid. There are a number of eligible people who never request information in the first place. Of those who request forms, many do not complete the application process. Those who do complete the application process often receive information that is untimely, non-targeted, and dense. This makes the FAFSA process unfriendly for potential students and not cost effective.

At the same time, there is a modernization effort under way which focuses on customer satisfaction and reduced cost, the implications of which are that we, at SFA, need to put our primary focus on students as our key customer and to encourage thoughtful planning so that repayment is not a burden. We will not have succeeded if we just get information out to students. We need to be encouraging the appropriate choice of postsecondary education so that students are headed in the right directions and, therefore, are not ultimately overwhelmed with repayment.

VISION OF SUCCESS-

All age ranges and socioeconomic groups believe they can get the necessary skills and knowledge to achieve their dreams. SFA puts the students first, treating them with dignity and respect by providing tailored services for different populations to access aid for traditional and non-traditional education. Organizations recognize that the work done by the Student Aid Awareness group is so compelling that it must continue.

GUIDING PRINCIPLES FOR THE YEAR 2000-

- Serving America's students
- Building the foundation for the future
- Working cross-functionally and collaboratively between SFA Channels and other ED offices
- Initiating and building partnerships with other organizations that can expand in the future
- Constantly communicating with others and inviting others to communicate with us about new and on-going efforts in the Student Aid Awareness arena.
- Continually enrolling people who are involved in individual efforts
- Looking for opportunities to develop and stretch people—both ourselves and others
- Must end in September of 2000 with concrete recommendations for a 2-year follow on IPT with objectives and activities

SPECIFIC AND CHALLENGING GOALS -

TOPIC	PERFORMANCE INDICATOR	GOALS	PURPOSE- SETTING THE STAGE FOR THE FUTURE
SFA Portal	<ul style="list-style-type: none"> • Capability to gather and summarize customer satisfaction • Capability to analyze customer feedback • The level of completion of the customer feedback and rating mechanisms on SFA website 	<ul style="list-style-type: none"> • Customer feedback and rating mechanisms on the SFA website by 6/2000 with links to other appropriate websites • Baseline customer satisfaction data summarized, and report format tested “live” by 9/2000 • Process for analyzing customer feedback in place by 9/2000 	<ul style="list-style-type: none"> • Making financial aid information readily accessible to differentiated populations through a user friendly electronic process • Continuous updating of the electronic process to reflect customer input and changes in technology
Special Needs Accessibility	<ul style="list-style-type: none"> • Accessibility of sight and hearing impaired population to student aid information • Number of call centers equipped to provide services to the hearing impaired 	<ul style="list-style-type: none"> • Sight and hearing impaired organizations and professions identified will be advised of availability of student aid information and how to access it for their populations by 9/2000 • All SFA call centers are equipped with TTY’s 	<ul style="list-style-type: none"> • To build meaningful partnerships with organizations that serve special needs populations to ensure that these populations always have the most current information on financial aid in formats that meet their special needs

Puerto Rico Partnership	<ul style="list-style-type: none"> • Degree to which an action plan meets the needs of the Puerto Rico education community • Number of student aid materials translated for the Puerto Rico education community • Number of SFA Spanish publications existing on the website 	<ul style="list-style-type: none"> • An action plan developed to build on those items regarding Puerto Rico in the OSFA Reinventing Service Report that are in alignment with the modernization effort by 9/2000 • At least three student aid materials translated based on Puerto Rico education community needs assessment by 9/2000 • All current SFA Spanish publications are accessible through SFA website by 9/2000 	<ul style="list-style-type: none"> • Ensure the Puerto Rico potential student population has access to the same information that is available in English so that it has as much access to post-secondary education as all other populations • We are current in our understanding of the needs of the Puerto Rico education community • Continue to expand student access in other languages
Outreach Partnership Workshop	<ul style="list-style-type: none"> • Extent to which a workshop partnership advances the long term intent of SFA 	<ul style="list-style-type: none"> • A partnership with an organization whose target audience is congruent with SFA's to conduct a Student Aid Awareness workshop by 9/2000 	<ul style="list-style-type: none"> • Building partnerships with other relevant organizations to work together to get financial aid information to all constituencies in a tailored way that is appropriate and accessible to all

Products and Services test	<ul style="list-style-type: none"> • Degree to which Student channel new products and services are tested by students and parents 	<ul style="list-style-type: none"> • Agreed upon protocol, set of standards, and process check list for new Student Channel products and services • All Student Channel new products and services will include testing by students and parents for accuracy, clarity, and ease of use 	<ul style="list-style-type: none"> • All people in SFA developing products or services develop the mind-set that our customers are the focal point of all our products and services and, therefore, automatically reach out to our customers to check for accuracy, clarity, and utility
Student Profile	<ul style="list-style-type: none"> • Existence of a working inventory of our most significant data base resources and what is in them • Degree to which we know the most important trends that will influence our targets for the future 	<ul style="list-style-type: none"> • Agreement on the major, significant internal and external data bases or resources we will rely on and an inventory of data included in each • Listing of trends in the profile of student characteristics—e.g. <ul style="list-style-type: none"> • Type of programs attending—-independent, non-traditional, traditional... • Average wage of college graduates versus non-graduates • Percent of traditional students going on to college • Rate of minority attendance—groups that are underserved • 30-40 year olds • Cost of post-secondary education • Patterns of aid for college • Profiling by segmentation • How the profile has changed • Agreement on the top ten interesting facts discovered in the trends • Display/wall charts of top ten facts and trends 	<ul style="list-style-type: none"> • Understanding of who we are and are not serving, using the most current data available • To use the most significant data to help us see where we need to target our efforts and why on a continuing basis

SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS-

- Must include adult population from 25-35
- Must include non-English speaking constituencies
- Must include early awareness
- Increase electronic applications filed to 4 million
- Must check in at least monthly with each of the sub-teams

CLEAR ROLES-

Sponsor	<ul style="list-style-type: none"> • Jeanne VanVlandren
Team Leader	<ul style="list-style-type: none"> • Linda Hall
Core Team Members	<ul style="list-style-type: none"> • Denise Leifeste • Bill Ryan • Adara Walton • Someone from Access America • Imagitas intern •
Advisory Members	<ul style="list-style-type: none"> • Someone from SFA Communications • Someone from OIIA (Office of Intergovernmental and Interagency Affairs) • Someone from OPE (Office of Post-Secondary Education) • A student or student representative (USSA or USPIRG) • Someone from Council 252, AFGE
Recorder/Documenter	<ul style="list-style-type: none"> • Administrative support person from the reorganization
	<ul style="list-style-type: none"> •
	<ul style="list-style-type: none"> •
DECISION-MAKING-	
<ul style="list-style-type: none"> • Core decisions 	<ul style="list-style-type: none"> • Consensus with fallback to Linda
<ul style="list-style-type: none"> • Funding 	<ul style="list-style-type: none"> • Sub-teams make requests of SAA Leadership Team that makes recommendations to Jeanne VanVlandren for approval
<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •

A COMMON AND COLLABORATIVE APPROACH-

OPERATING AGREEMENTS AND PRINCIPLES- how we want to work together-

- Agree to move on
- Work cooperatively
- Interject ideas at appropriate time
- Team defends a position to sponsor and others—speak with one voice
- Open, honest discussions
- Reach consensus on decisions, not majority vote
- Ask input from all members on each topic
- Think outside box
- Have fun—enjoy it
- Volunteer for assignments
- Respect others' opinions
- Be accountable

HOW OFTEN THE CORE TEAM WILL MEET AND OTHER TEAM AGREEMENTS-

- Meet once a week

COMPLEMENTARY SKILLS AND RESOURCES -

KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS-

COMPETENCY REQUIREMENTS FOR THE TEAM-

- Positive attitude, open-mindedness, committed to the values of the PBO
- Public speaking and presentation skills
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RESOURCE REQUIREMENTS—(time, people, money, materials)

- Administrative assistance, including—getting minutes/flipcharts produced and disseminated; arranging for appropriate meeting rooms and supplies; notification to participants about logistics;...
- Commitment to at least the resources presented in the reorganization package with the travel and funding necessary to meet the goals and implementation plans of the teams
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OTHER

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